

**Appendix E**  
**to the**  
**Wisconsin Works (W-2) and Related Programs Contract**  
**for the period January 1, 2006 through December 31, 2009**

**Definitions for the 2006-2009**  
**W-2 and Related Programs Contract**

The following definitions are used in this Contract unless defined otherwise in context:

Allowable Costs: costs identified as allowable in the Department's "Wisconsin Works (W-2) Financial Management Manual."

Administration Costs: expenses for administration of W-2 and Related Programs, including AMSO and other expenses defined as administration by federal regulations governing W-2 and Related Programs. Administration Costs may not exceed fifteen percent (15%) of the total reported expenses as identified in the Department's payment system.

Agency Management Support and Overhead: expenses for agency management support and overhead as identified in the Department's Policies and Procedures which must be included in Administrative Costs.

Applicant: an individual who applies for any service of the W-2 and Related Programs including support services.

Barrier Screening Tool: tool used to identify the potential presence or risk of a personal barrier to normal functioning in an employment setting.

Base Allocation: the amount that equals the sum of Services/Administration and Benefits allocation, treated as a single inseparable allocation for the purposes of reimbursement.

Business day: Monday through Friday except State holidays as defined in the Wisconsin Statutes.

Central Office Reporting system: the system used by the Department to process expenditure reports.

Children First: an employment and training program for noncustodial parents.

Client Assistance for Re-employment and Economic Support system: Wisconsin's automated eligibility determination, benefit calculation and management system for the W-2, Child Care, FoodShare, and Medicaid programs.

Committee advisory to the Department: a body including W-2 Contract Agency representatives selected by the Department to provide advice to the Department on matters relating to W-2.

Community Service Job: one of the employment positions in the W-2 program.

Community Steering Committee: a group of individuals appointed in accordance with and for the purposes identified in section 49.143(2) of the Wisconsin Statutes.

Compliance Contact: communication between the Department and the W-2 Contract Agency concerning compliance with any requirement of the Contract or of any policy incorporated by reference in the Contract. A Compliance Contact may include, but is not limited to, oral communication in person or over the telephone, or written communication in the form of e-mail, handwritten notes or printed documents. A Compliance Contact may be initiated by either the Department or the W-2 Contract Agency. A Compliance Contact may involve a very simple issue or a very lengthy and complex issue.

Consortium: A W-2 consortium is a combination of two or more W-2 geographic areas in the same Workforce Development Area (WDA) for the W-2 and Related Programs. DWD encourages the formation of consortia.

Contract: the Wisconsin Works (W-2) and Related Programs Contract for the period January 1, 2006 through December 31, 2009, between the Wisconsin Department of Workforce Development and the W-2 Contract Agency, (referred to in this document as the Contract).

Contract Period: the time period of January 1, 2006 through December 31, 2009, referred to as the 2006-09 W-2 Contract.

Corrective Action: action the Department deems necessary to remedy noncompliance with the W-2 and Related Programs Contract.

Custodial parent: with respect to a dependent child, a parent who resides with the dependent child and, if there has been a determination of legal custody with respect to the dependent child, has legal custody.

Custodial parent of an Infant Payment: W-2 payment allowed up to twelve (12) weeks to provide time to bond with a newborn child.

Days: calendar days unless otherwise specified.

Department: Wisconsin Department of Workforce Development.

Department's Contract Manager: the DWS staff who manage the W-2 Contracts on a daily basis.

Department of Administration: the Department which administers State comptroller functions.

Dependent Child: a person who resides with a parent and who is under the age of eighteen (18) or, a person under the age of nineteen (19) if the person is a full-time student at a secondary school or a vocational or technical equivalent and is reasonably expected to complete the program before attaining the age of nineteen (19).

Earned Income Credit: a refundable federal or State tax benefit designed to help low income workers increase their financial stability and maintain their independence from the welfare system. (May also be referred to as Earned Income Tax Credit "EITC").

Electronic Benefit Transfer: the FoodShare issuance made through an electronic system.

Electronic Data Systems-Federal: the firm currently under contract as the State's fiscal agent (the payor of claims) for Wisconsin's Medicaid Program.

Employment Stabilization: Keeping recently employed W-2 participants connected to the workforce. The W-2 Contract Agency must provide an array of services that assist participants in retaining their current job or providing services to rapidly reattach them to the workforce if the job is lost.

Enterprise Output Solutions: the automated report system for programs reported through CARES.

Equipment: Information Technology ("IT") hardware, software and peripherals and non-IT related items with a purchase price of \$5,000 or greater per item.

Failure Penalty: penalty determined by the Department for a W-2 agency's failure to implement a program or operation requirement(s) for the W-2 and Related Programs.

Faith-based Provider: an organization that is religious in nature, charitable in nature, or that follows a mission that promotes moral and character values that are consistent with the philosophy of Wisconsin Works.

FoodShare: FoodShare Wisconsin: the food and nutrition program for eligible Wisconsin residents (formerly the Food Stamp program.)

FoodShare Employment and Training: the employment and training program for FoodShare Wisconsin participants.

Financial and Employment Planner: a required position in the W-2 agency.

Geographic Area: the area determined by the Department for which a Wisconsin Works agency will administer Wisconsin Works. Note: Except for federally recognized American Indian reservations and in counties with a population of 500,000 or more, no geographical area may be smaller than one county. A geographical area may include more than one county.

IM Agency: the county or tribal agency required to perform IM services.

IM Case: a case receiving FoodShare or Medicaid or both.

Incentive-Based Contracts: Milwaukee W-2 Contract Agencies and any other W-2 Contract Agencies whose Community Service Jobs (CSJ) caseload reaches fifty (50) or more for three (3) consecutive months will be subject to Incentive Based Contracts whereby twenty percent (20%) of the administration and services funding must be earned through achieving specific program outcomes.

Incoming W-2 agency: the agency awarded a W-2 Contract as a replacement W-2 agency for a W-2 geographic area that becomes open for competition within a W-2 Contract Period.

Integrated Service Delivery: the requirement that W-2 Contract Agencies collaborate with other service providers when families are working with multiple providers to ensure development of plans that are consistent and effectively assist the family to move toward self-sufficiency.

Job Center: a service site that meets Job Center standards and provides an array of employment and training services to both job seekers and employers.

JobNet: a self-service computer-aided system that job seekers utilize to quickly find available job openings and employers utilize to post job openings administered by DWS.

Job Service: the operating unit within DWS that administers labor exchange services under the Wagner-Peyser Act.

Kids Information Data System: an automated system used by the Department and county/tribal child support agencies.

LEP Plan: the W-2 agency's plan for services for Limited English Proficiency participants.

Lead Agency: designation of one agency/entity among partners in a consortium. The Lead Agency will be the single point of contact between the consortium and DWD and will be accountable for the operation of the consortium.

Learnfare: a program to improve school attendance for children whose parents are in a W-2 employment position.

Less-than-arms-length transaction: A "less-than-arms-length transaction" or "related-party transaction" occurs when one party to a transaction can influence the management or financial operating policies of the other party. Examples of related party transactions include, but are not limited to, transactions between: (a) divisions of an organization; (b) organizations under common control through common officers, directors, or members; and (c) an organization and a director, trustee, officer, or key employee of the organization or his immediate family either directly or through corporations, trusts, or similar arrangements in which they hold controlling interest.

Medicaid: a health care coverage program for eligible Wisconsin residents.

Minority Business Enterprise: a business certified by the Wisconsin Department of Commerce.

Non Custodial Parent: a parent who is not the custodial parent of a child in a W-2 group.

Ombudsperson: a function created for Milwaukee County to support W-2 applicants and participants in rapidly addressing their needs and concerns with Milwaukee W-2 Contract Agencies.

Other Service Sites: a location where at least one of the core Job Center partners delivers program services that offer some Job Center services and access to other Job Center services and partner program services.

Outgoing W-2 Contract Agency: the W-2 Contract Agency that exits its W-2 Contract prior to the end of the current W-2 Contract Period.

Parent: the biological parent, a person who has consented to the artificial insemination of his wife under section 891.40 of the Wisconsin Statutes, or a parent by adoption.

Partial Contract Period: a time period that is less than the Contract Period of the current W-2 Contract.

Participant: an individual who participates in any component of W-2 and Related Programs.

Performance Incentives: requirement that large W-2 Contract Agencies earn 20% of their administration and services contract amount through specific program placement outcomes. The 20% is reimbursement of allowable costs released when minimum program placement outcomes are achieved.

Preferred Provider Registry: the registry to be used by Milwaukee W-2 Agencies for contracting of specialized case services that will assure quality services, cost savings and community involvement.

Program Integrity: the term used to define the Fraud Program functions performed by W-2 agencies to administer the Fraud Program, but excluding Fraud Investigation Services performed by the State selected provider.

Proposal: the proposal submitted by the proposer agency in response to the Department's Request for Proposals ("RFP").

Proposer Agency: an entity submitting a proposal in response to the Department's RFP.

Refugee Cash Assistance and Refugee Medical Assistance: a cash and Medical Assistance Program for newly arrived low income refugees who do not meet W-2 and Medicaid eligibility criteria.

Request for Proposals: the Department's Request for Proposals ("RFP") to Administer Wisconsin Works (W-2) and Related Programs, issued by the Department, and the Addenda to the Request for Proposals issued by the Department.

Right of First Selection: the term used to describe the first phase of the process to select W-2 agencies for the next W-2 and Related Programs Contract Period.

Soft-skills CSJ: training in CSJ placement involving time management, budgeting, problem solving, etc.

SSI/SSDI Advocacy Agency: an agency that provides comprehensive advocacy services to W-2 participants identified as appropriate for referral to SSI/SSDI.

State: the State of Wisconsin.

State's W-2 Administrator: the DWS Administrator.

Supplemental Security Income: a program which is administered by the Social Security Administration.

Trial Job: one of the employment positions in the W-2 program.

Tribe: a federally-recognized American Indian Tribe or Band located in the State.

W-2 Administrator: the DWS Administrator.

W-2 Contract Agency: the Proposer Agency awarded the Contract or the RFS W-2 Agency under the Contract required to perform W-2 and Related Programs services and to implement the W-2 program in a given geographic area or areas, wholly accountable and responsible for results.

W-2 and Related Programs: the comprehensive array of programs and services including, but not limited to, W-2 employment positions, W-2 case management, FoodShare Employment and Training, Child Care, Refugee Cash Assistance and Refugee Medicaid, Job Access Loans, Learnfare and Children First (optional).

W-2 Case: a case requesting W-2 and Related Programs (as defined in the Contract), unless otherwise defined in the Contract. A case receiving FoodShare or Medicaid or both but none of the programs or services defined as W-2 and Related Programs is not a W-2 case.

W-2 Employment Positions: Trial Job, Community Service Job, W-2 Transition.

W-2 Geographic Area: the area determined by the Department for which a Wisconsin Works agency will administer Wisconsin Works. Except for federally recognized American Indian reservations and in counties with a population of 500,000 or more, no geographic area may be smaller than one county. A geographic area may include more than one county. The Department need not establish the geographic areas by rule.

W-2 Group: a cohabiting group that includes custodial parent(s), their dependent children and any children of the dependent children in the group. The W-2 group also includes any non-marital co-parent or any spouse of the individual who resides in the same household as the individual and any dependent children with respect to whom the spouse or non-marital co-parent is a custodial parent. The W-2 group does not include any person who is receiving cash or other non-medical benefits under the county relief block grant program.

W-2 Job Seeker: an individual who participates in any component of W-2 and Related Programs.

W-2 Plan: the W-2 agency's approved Plan to Administer W-2 and Related Programs, incorporated by reference into the Contract (The Plan is either an approved RFS W-2 Plan or an approved Proposal).

W-2 Services Area: The area defined by the Department for which a W-2 Contract Agency will administer W-2 and Related Programs services.

For Milwaukee County, there will be five W-2 Service Areas. Based on the Department's contracts, some Milwaukee W-2 Contract Agencies may administer services in more than one Milwaukee W-2 Service Area. As specified in this RFP and other documents, the Department may require a Milwaukee W-2 Contract Agency with multiple W-2 Service Areas to provide specific staff positions and/or other requirements for each Milwaukee W-2 Service Area.

For balance of state (Wisconsin areas outside Milwaukee County), W-2 Service Areas will be defined by the Department in the W-2 Agency contracts. Each balance of state W-2 Service Area will be either an individual county area or a consortium composed of multiple county areas. As specified in this RFP and other documents, the Department may require a balance of state W-2 Agency to provide specific staff positions and/or other requirements for the W-2 Service Area.

W-2 Transition: one of the employment positions in the W-2 program.

Wisconsin Works: Wisconsin's welfare replacement program which eliminates entitlement and places the focus on work.

Women, Infant and Children Program: a program to provide food items for pregnant women and children under five (5) years of age.

Workforce Development Area: one of eleven areas approved by the Department of Administration for the management of employment and training services.

Workforce Development Boards: the agency responsible for managing the Workforce Investment Act Title I program. The agency may be the Private Industry Council, Workforce Development Board or Workforce Investment Board.

Workforce Investment Act: 1998 federal legislation that establishes the role of the job center systems in the delivery of employment and training programs, including the TANF and FSET programs.

Work Programs Employment History: a subsystem of the Work Programs subsystem of CARES.

## **Acronyms and Abbreviations**

ABAWD: Able-Bodied Adult Without Dependents.

ABE: Adult Basic Education

AMSO: Agency Management Support and Overhead.

ANSE: A CARES screen titled School Enrollment.

AODA: Alcohol and Other Drug Abuse.

BDS: Bureau of Division-wide Services.

BOS: Balance of State W-2 Agencies

BST: Barrier Screening Tool

BW-2: Bureau of Wisconsin Works

BWI: Bureau of Workforce Information

CARES: Client Assistance for Re-employment and Economic Support system

CFR: Code of Federal Regulations

CMA: Milwaukee W-2 Case Management Agencies

CMC: Custodial Parent of an Infant

CMF: A CARES code for Individuals who Obtained Employment while Receiving W-2 benefits

CMM: A CARES code for Minor Parent

CMP: A CARES code for Pregnant Women

CMS: A CARES code for Job Ready Individuals

CMU: A CARES code for Working Individuals

CORe: Central Office Reporting system

CSA: Child Support Agency

CRC: Civil Rights Compliance

CSC: Community Steering Committee

CSJ: Community Service Job

CSN: Children's Services Network

DWD: Wisconsin State Department of Workforce Development

DWS: Division of Workforce Solutions

EBT: Electronic Benefit Transfer

EDS-F: Electronic Data Systems-Federal

EIC: Earned Income Credit

EITC: Earned Income Tax Credit

EOS: Enterprise Output Solutions

ES: Economic Support

ESL: English as a Second Language

FEP: Financial and Employment Planner

FPL: Federal Poverty Level

FS: FoodShare Program

FASL: Functional Agency Security Liaison

FSET: FoodShare Employment and Training program

GED/HSED: General Education Development/High School Equivalency Diploma

IM: Income Maintenance

IPV: Intentional Program Violation

IT: Information Technology

JDPA: Milwaukee W-2 Job Development and Placement Agencies

KIDS: Kids Information Data System

LEP: Limited English Proficiency

MBE: Minority Business Enterprise

NCP: Non Custodial Parent

Non-IT Equipment: Non-Informational Technology Equipment

OJT: On-the-Job Training

RAP: Refugee Assistance Program

RFP: Request for Proposals

RFS: Right of First Selection

RS: Resource Specialist

SSDI: Social Security Disability Insurance

SSI: Supplemental Security Income

SSP: Supportive Services Planner

TANF: Temporary Assistance for Needy Families program

W-2: Wisconsin Works

W-2T: W-2 Transition placement

WDA: Workforce Development Area

WDB: Workforce Development Board

WIA: Workforce Investment Act

WIB: Workforce Investment Board

WIC: Women, Infant and Children Program

WPEH: A CARES screen titled Work Programs Employment History